

# Creating Health Insurance Exception Reports

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## **MUNIS**

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# 1 Introduction

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By following the instructions in this guide, you will be able to create two health insurance comparison reports to help you resolve discrepancies between Office of Public Employees Health Insurance (OPEHI) and MUNIS records.

Resolving the discrepancies will allow OPEHI to begin sending you periodic transaction files that will automatically enter and update employee health insurance information in the MUNIS system.

It is critical that each district follow the instructions to identify and correct discrepancies between the district health insurance information and OPEHI's Group Health Insurance (GHI) information in a timely fashion.

## 1.1 Background

At the beginning of calendar year 2004, OPEHI and KDE implemented an automated process for entering and updating the employee health insurance information in the MUNIS system. During the new implementation, unexpected inconsistencies between the two systems were found, which resulted in a need to temporarily halt the process. These inconsistencies have been reconciled, and the automated process is ready to be implemented.

In order to reestablish the implementation, the health insurance coverage information contained in MUNIS **must** match the information contained in OPEHI's GHI system as the GHI system contains the health insurance information for the carrier's record. We will ensure that the insurance information matches by following the process below.

## 1.2 Process overview

1. OPEHI sends district snapshot file.
2. The KDE MUNIS team takes steps to facilitate the reporting process and contacts your district to let you know when this process is complete.
3. District follows instructions in this document to run the 2 health insurance comparison reports. The steps in this guide **must** be performed as soon as your district receives the snapshot file and the KDE MUNIS team contacts your district.
4. District reviews the reports and contacts OPEHI to reconcile discrepancies.
5. OPEHI sends district periodic transaction files.
6. Districts start using periodic transaction files to automatically update MUNIS health insurance information.

## 1.3 Automatic Updates from OPEHI

After your district receives the snapshot file, it will begin to receive periodic transaction files, which contain changes to employees' health insurance, new enrollments, and terminations, specifically when the carriers terminate for non-payment. For these terminations, only the Planholder and cross-referenced spouse (if applicable) information is sent. No other dependent information is on the files.

**Maintenance to Employee Termination Dates (Employee Master File) and Health Insurance Termination Dates (Enrollment Maintenance Screen) is still required in MUNIS.**

In order to keep the GHI and district MUNIS health insurance information synchronized, districts **must** process the transaction files. OPEHI strongly discourages districts from making manual changes to the MUNIS health insurance file. OPEHI advises districts that they **must** utilize the periodic transaction files to update the MUNIS health insurance information.

### ***1.4 If You Need Help***

If you have explored this guide and you still have questions, please contact MUNIS Payroll Support Desk at 800-722-4908.

## 2 Running Reports

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After completing the instructions in this section, you will have an OPEHIERR and Exception report that you may use to identify discrepancies. Before you complete these instructions, please ensure:

- ☐ OPEHI has sent your district a snapshot file.
- ☐ The KDE MUNIS team has contacted your district to let you know that your district is ready to run the reports.

### 2.1 *Preparing an OPEHIERR (Social Security Number Discrepancy) Report*

Note: The following utility must be run by a MUNIS user that has permission to log in to the RS6000 as Root.

KDE, OET has created two customized utilities to facilitate the reporting process. The instructions below will help you execute the first customized utility and run a report that will identify employees in the MUNIS enrollment file that are not found in the OPEHI file. This report will be called OPEHIERR.

1. Connect to the RS6000 from the console and log in as **root**.
2. At the "\$" prompt, type **cd /fms/munis** and press **Enter**.
3. At the "\$" prompt, type **./hlcompare** and press **Enter**. This utility may take a few minutes or longer to run depending upon the number of employees in the MUNIS enrollment table.
4. Type **exit** to logout as **root**.
5. Social Security Numbers found in MUNIS but not in the OPEHI file have been printed to a spooled file named **OPEHIERR**. Advise the benefits coordinator to print this spooled file from Spool File maintenance in order to review the discrepancies. Please see section 3, *Viewing or Printing Spool Files*.
6. The OPEHIERR report shows a list of employee numbers, names and Social Security numbers that are not found in the OPEHI file but are found in the MUNIS file. Please verify the accuracy of the MUNIS entry, and then contact OPEHI at (502) 564-1205 to reconcile these differences.

## 2.2 Running an Exception Report in MUNIS

The instructions below will help you execute the second customized utility from the RS6000, then run the exception report in MUNIS. They also explain what to do with the report before you contact OPEHI to resolve any discrepancies.

### 2.2.1 Running the Exception Utility

Note: The following utility must be run by a MUNIS user that has permission to log in to the RS6000 as **Root**.

This utility changes the “Pre Tax” status to blank, if the status is not already blank, for employees that are waiving coverage. Though this change has no impact on employees’ health information, it does exclude differences from needlessly appearing on the exception report.

1. Connect to the RS6000 from the console and log in as **root**.
2. At the “\$” prompt, type **cd /fms/munis** and press **Enter**.
3. At the “\$” prompt, type **./pretaxup** and press **Enter**.
4. Type **exit** to logout as **root**.

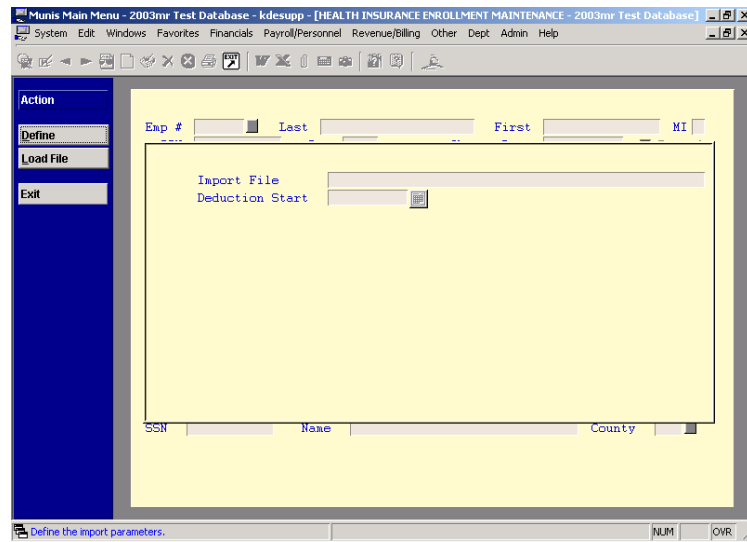
The pre-tax field is now blank for all waivers. Advise the benefits coordinator to go to MUNIS to run the exception Report.

### 2.2.2 Running the Exception Report

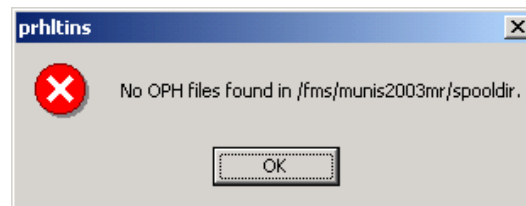
After running the utilities above, perform the following steps in MUNIS to generate an exception report. The report will show differences between the MUNIS information and the OPEHI snapshot file.

1. Go to the Enrollment Maintenance screen and select **Import** from the left menu bar. The Import screen appears.

The screenshot shows the MUNIS Main Menu window with the 'Import' option selected in the left menu bar. The main area contains various fields for employee information and insurance details, including Employee #, Last, First, MI, SSN, Loc, Change Date, and Posted. Below these are fields for Effective Date, Sequence, Ded Start, Day Phone, Waive Coverage, Pre-Tax, Months Covered, Health Ins Term, Escrow Run, Tot Ded Cycles, Plan County, Esc-Liq Cycles, Carrier, Cycles/Month, Monthly Premium, Plan, State Contrib, Coverage, Employer Contrib, Level, Per Check Amt, EE Term Date, Per Check Escrow, Flexible Spending, Flex Vendor, Flex Spend Amt, and Cross Reference Data. At the bottom, there are fields for SSN, Name, and County.



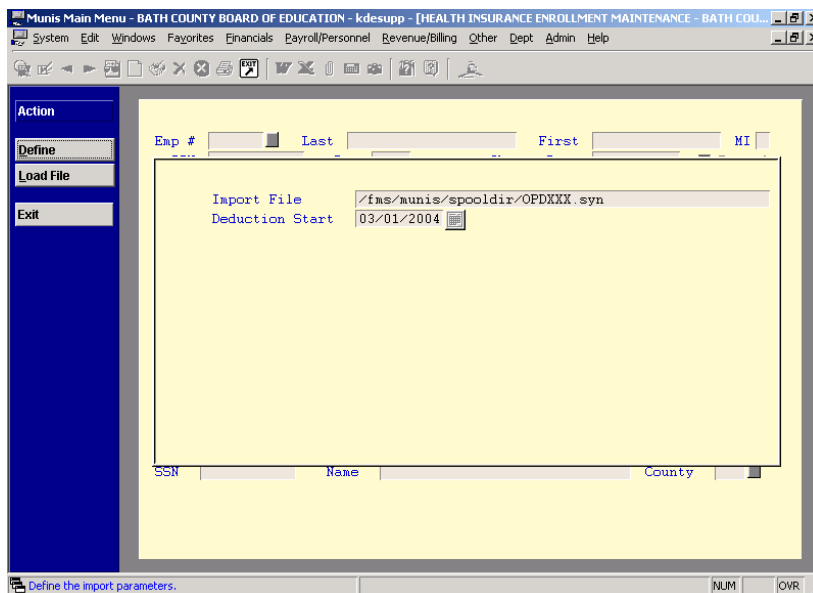
2. Select **Define**. An error message is displayed stating that there is no “OPH” file in the directory.



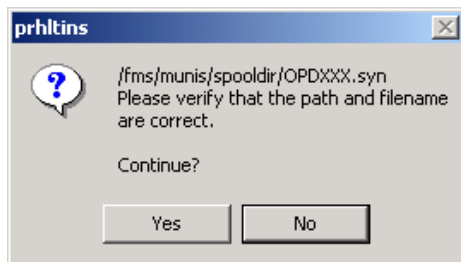
3. Select OK. The original import file screen appears displaying a blank field for the “Import File” and “Deduction Start” fields.

*Go on to the next page...*

4. Replacing the district's 3-digit number for XXX, enter /fms/munis/spooldir/OPDXXX.syn into the "Import File" field. For example, if the district number is 123, enter /fms/munis/spooldir/OPD123.syn.



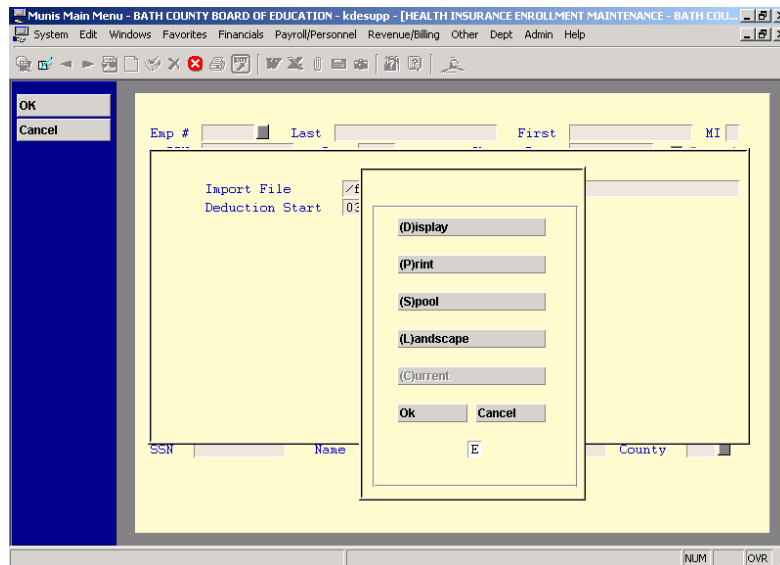
5. Enter today's date in the "Deduction Start" field.
6. Select the Load File button. You will be prompted with the full path and file name of the file to be imported, and asked if you wish to continue. Select Yes to continue.



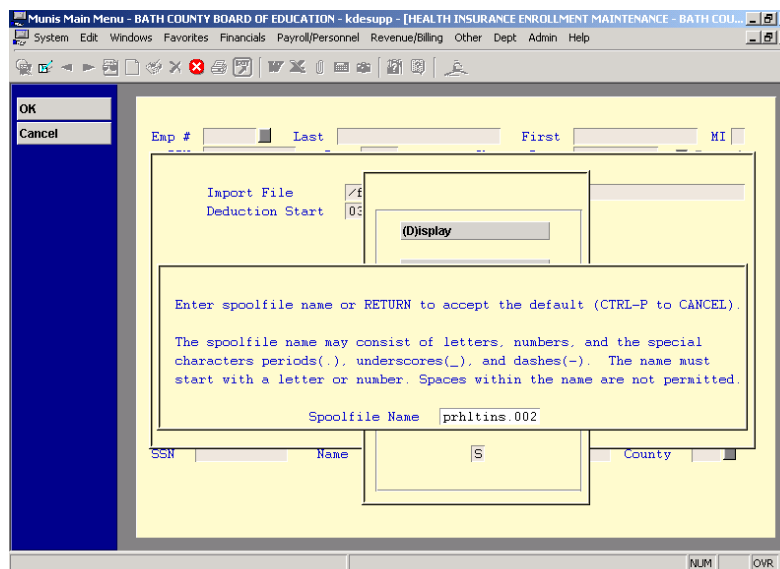
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7. At the prompt to Display, Print or Spool, choose Spool. **Note: It is best to always spool this output.**



8. Enter the spool file name or press the Enter key to accept the default name.



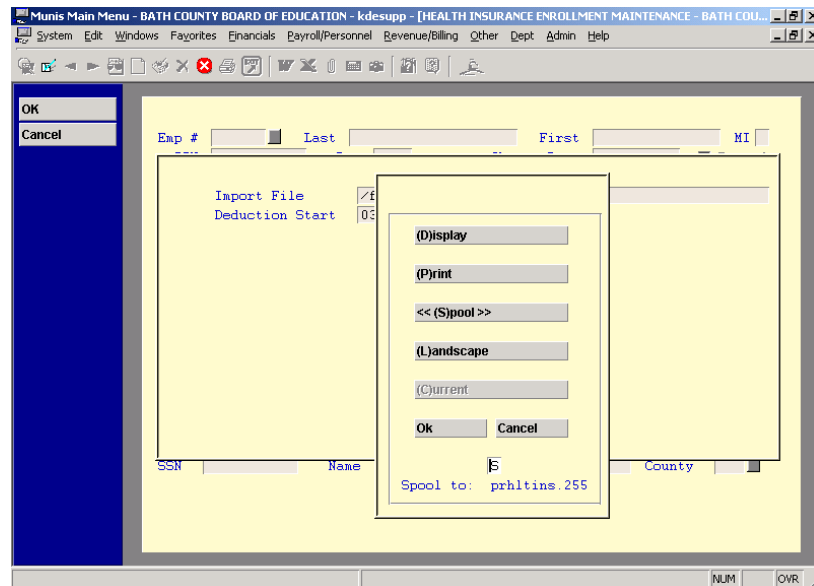
9. Record the spool file name in the blank below. You may need to refer back to this file name later.

**SPOOL FILE NAME:**

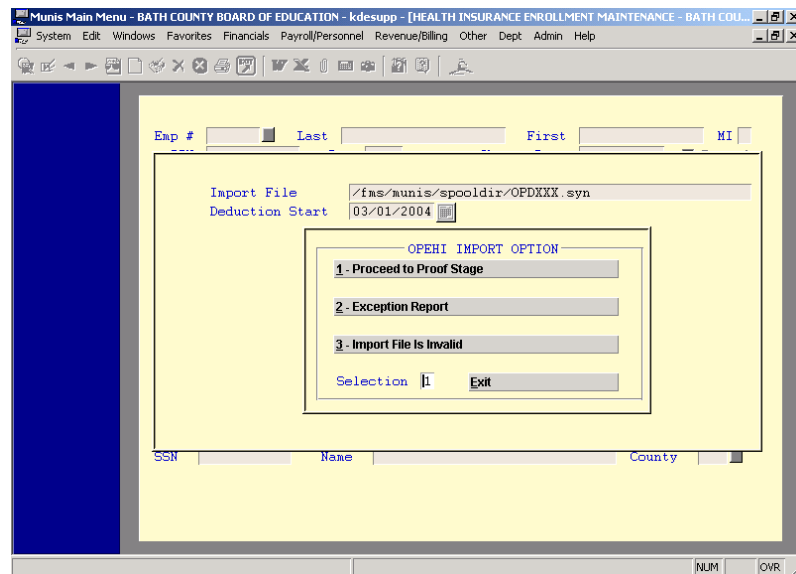
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10. Click OK to Spool the file.

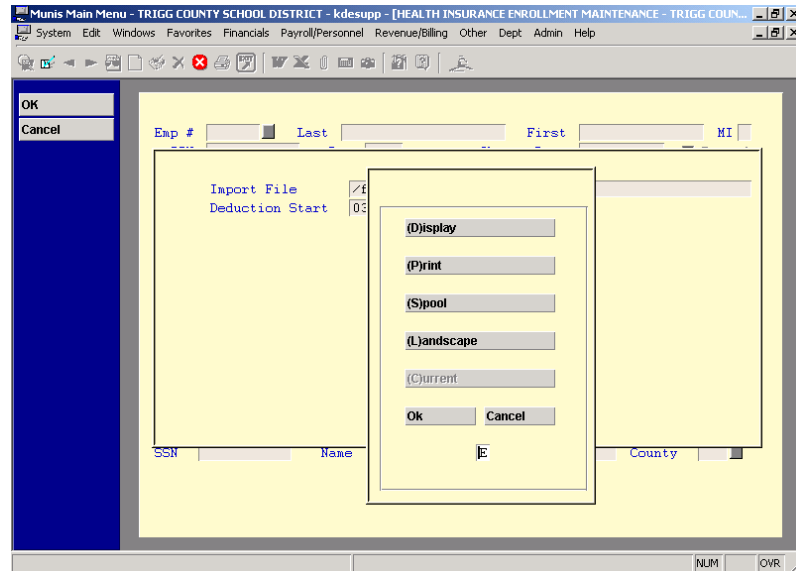


11. On the next screen, select the **2-Exception Report** option. You will see employee numbers displayed at the bottom left of the screen as the comparison is performed in the background.

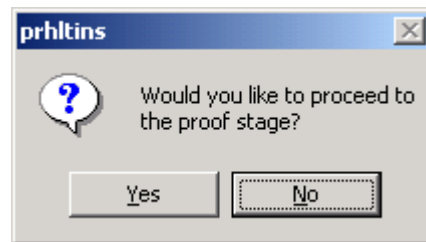


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12. Click the Print button to print the exception report. This will only print records with coverage discrepancies.



13. After you print the Exception Report, you will see a message saying, "Would you like to proceed to the proof stage?" Select **No** to return to the import menu, without importing records. **Do not proceed to the proof stage.** The OPEHI file remains untouched in the MUNIS spool directory.



*Go on to the next page...*

14. After choosing no, **Exit** from the import function and proceed to the next section.

Munis Main Menu - BATH COUNTY BOARD OF EDUCATION - kdesupp - [HEALTH INSURANCE ENROLLMENT MAINTENANCE - BATH COU.]

System Edit Windows Favorites Financials Payroll/Personnel Revenue/Billing Other Dept Admin Help

Action

Define

Load File

Exit

Emp # Last First MI

Import File /fas/munis/spooldir/OPD025.syn

Deduction Start 03/15/2004

SSN Name County

Import employee records from an external OPEHI file.

NUM OVR

### 2.2.3 Interpreting the Exception Report

Please look at the exception report and compare the “Most Recent MUNIS Record” column to the “OPEHI Import File” column. If you see any of the differences listed in the table below, see the “Before You Contact OPEHI” column, then follow the instructions below to contact OPEHI.

1. Check the employee’s files to verify coverage. Consider recent changes made to MUNIS that OPEHI may not have received at the point the snapshot file was created.
2. Ensure you have the Social Security Number (SSN) of the employee in question readily available. OPEHI needs the SSN in order to research the employee’s record.
3. Contact OPEHI at **(502) 564-1205**.
4. If the discrepancy might be a recent change, inform OPEHI of the recent submission of a change form so that they are aware of this possibility.

#### Exception Report Discrepancy Table

Differences in...	Before you contact OPEHI...
Plan County	Note that the plan county determines the rate of the plan and the amount that the state contributes toward the plan.
Plan Carrier	Review the employee’s open enrollment form for district accuracy.
Plan	Note that “Plan” refers to 1- HMO, 2- POS, 3- PPO or 5- EPO.
Coverage	Note that “Coverage” refers to 1- Single, 2- Couple, 4- Parent Plus, 5-Family.
Level	Note that “Level” refers to either level A or level B.
Employee in MUNIS is listed as WAIVED but in OPEHI, the employee has coverage.	Follow instructions above to contact OPEHI.
Employee in MUNIS has coverage, but employee is WAIVED in OPEHI.	Follow instructions above to contact OPEHI.
Cross Reference Name	<p>If it is a <b>minor difference</b> such as Smoot Jones versus Smoot T. Jones, you can change the MUNIS name to match the OPEHI name, though this is not necessary.</p> <p>If it is a <b>major difference</b> such as Smoot Jones versus Terry Smith, this difference must be resolved through OPEHI. <b>OPEHI should be contacted only when there is a major difference.</b></p> <p>Please understand that the name per OPEHI is the name submitted to the carrier.</p>

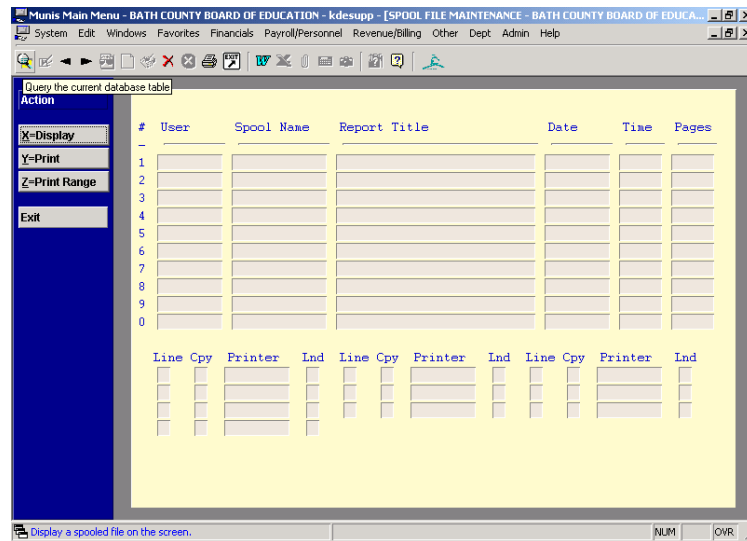
Differences in...	Before you contact OPEHI...
Employee SSN not found	<p>Note that this indicates that OPEHI has an insurance record for an individual that is not listed as "active" in the Payroll Master File.</p> <p>Employees on Leave without Pay covered by the Family Medical Leave Act are the only inactive employees that should continue to have insurance. Employees on Leave without Pay with Worker's Comp must have their health insurance termed and be offered Cobra Coverage.</p> <p>If inactive employees that are not on FMLA but are on Leave without Pay are included on this exception report, then OPEHI must be notified to term the insurance. Submit an "Erroneously Omitted or Submitted Form" to School Finance. Send the employee the proper Cobra notification. Determine and correct additional errors from this oversight.</p> <p>It is possible that the SSN belongs to an individual who has transferred to a different school district and OPEHI is not aware of the transfer.</p> <p>This exception would also include employees that have never been employees of this district.</p>

Differences in...	Before you contact OPEHI...
Enrollment Record not found	<p>Please read all of the following information:</p> <p>If you don't see an enrollment record or if you see this message on the report, this means the OPEHI file contains a record for an active employee that matches a SSN found in the school's employee master file, but there was not an enrollment record found in the Health Insurance Enrollment File.</p> <p>It is possible that OPEHI incorrectly shows this employee with health insurance at the district, but the employee is no longer at the district and the master file record in MUNIS has not been inactivated. If this is the case, contact OPEHI to reconcile this discrepancy.</p> <p>Another possibility for this error is that a new employee has been added to the Health Insurance Enrollment File with an effective date greater than the effective date on the OPEHI file. For example, the effective date on an enrollment record in MUNIS is 04/01/2004, but the OPEHI file shows 03/12/2004 as the effective date for all of its records.</p> <p>The OPEHI snapshot has been coded so that the effective date for all records at OPEHI is the date that the snapshot file is created. In this situation, you should check the OPEHI spool file to verify that the district's record for the employee in question agrees with the OPEHI record. If both records agree, OPEHI does not need to be contacted. Otherwise, the discrepancy must be resolved with OPEHI. Please see the <i>Viewing or Printing Spool Files</i> section in this document.</p> <p>It is possible that OPEHI has correctly added an employee to a carrier but the district has not added the enrollment record. The spooled file must be reviewed to determine the OPEHI entry. Finding the employee on the spooled file requires the SSN. The pages for each employee are organized in SSN order. Please see the instructions below for printing a spool file.</p>

### 3 Viewing or Printing Spool Files

To display or print a spool file:

1. From MUNIS Select:
  - a. System
  - b. Spool File Maintenance
2. Click the magnifying glass icon and select the spooled file that you want to view or print. If you want to view or print the snapshot file, use the file name you wrote down in step 12 on page 10.



3. Select **X=Display** or **Y=Print**. Each employee is on a separate page. The employees are listed in SSN order.

